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Report

NO. 10 ANALYSIS OF THE
STUDY OF THE SUDBURY TOURIST REGION

- THE OPINIONS OF ITS VISITORS -

THE PERFORMANCE OF ITS TOURIST PLANT

JULY 1 - SEPTEMBER 1, 1965

TRAVEL RESEARCH BRANCH
September, 1966

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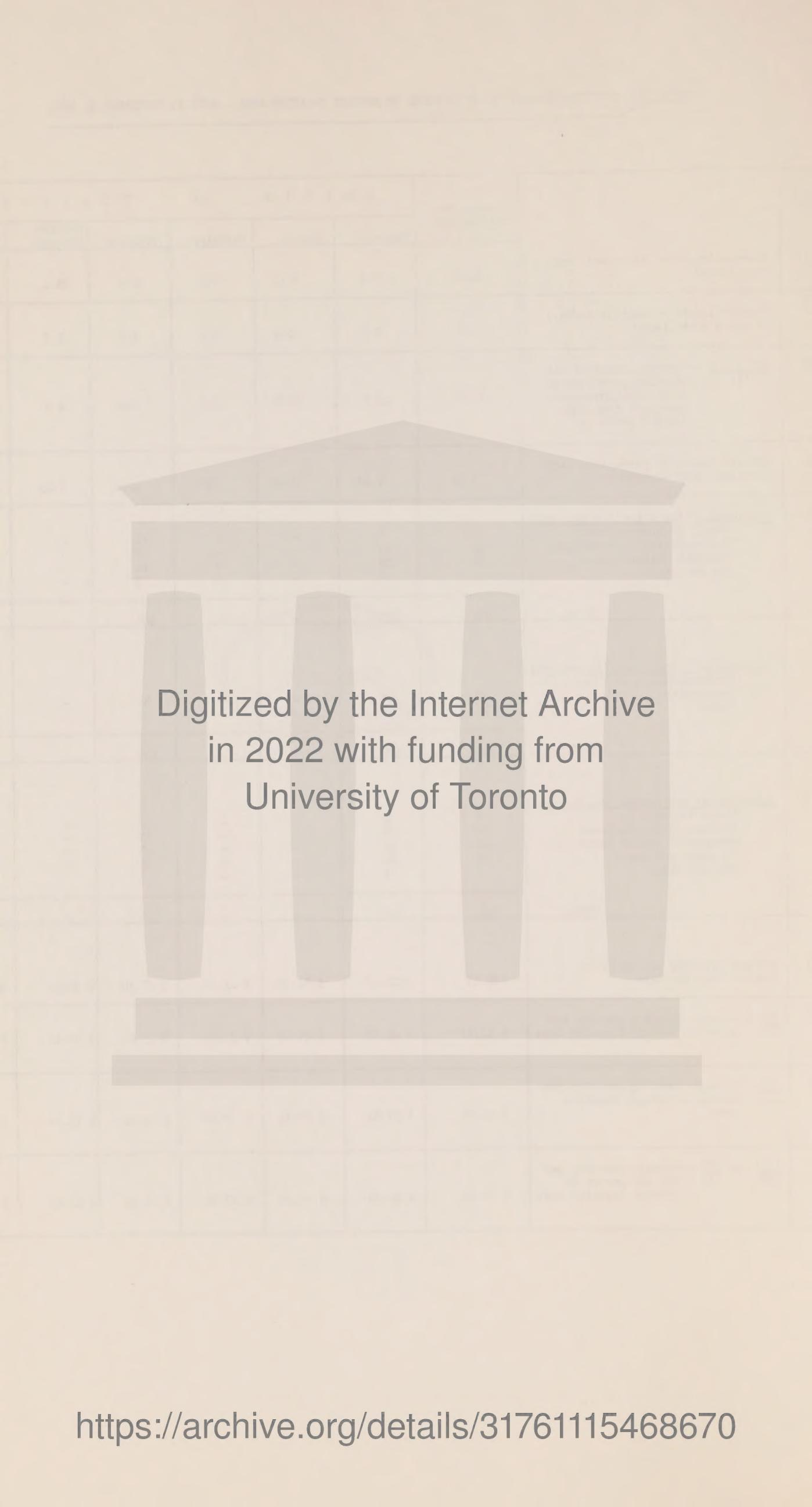
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By Peter Klopchic, Ph.D.
TRAVEL RESEARCH BRANCH
ONTARIO DEPARTMENT OF TOURISM AND INFORMATION
September, 1966



TABLE "A"- SELECTED STATISTICS ON VISITORS TO SUDBURY VACATION AREA - JULY 1, SEPTEMBER 1, 1965

		Average for All Visitors	O R I G I N O F V I S I T O R S					
			Ontario	Quebec	Maritimes	Prairies	British Columbia	U.S.A.
(1)	Average length of time away from home (Days)	13.3	10.8	17.5	25.9	20.2	28.4	13.2
(2)	Average length of stay in Sudbury Vacation Area (Days)	2.6	2.5	2.4	0.8	1.1	1.3	3.1
(3)	(2) x 100 = Average length of stay in Sudbury as percent of average length of time away from home (in per cent)	19.5	23.1	13.7	3.1	5.4	4.6	23.5
(4)	Average number of persons in each visiting party to Sudbury	3.46	3.48	3.40	3.00	4.04	3.25	3.33
(5)	Respondents' Education (in per cent)							
	Public or grade school	9	9	-	-	12	-	5
	Intermediate (Tech or High)	62	63	-	-	58	-	62
	Complete University	23	22	-	-	25	-	27
	Did not state	6	6	-	-	5	-	6
	TOTAL	100	100	-	-	100	-	100
(6)	Respondents' Occupation (in per cent)							
	Professional, technical, managerial	30	29	-	-	34	-	28
	Other	70	71	-	-	66	-	72
	TOTAL	100	100	-	-	100	-	100
(7)	Respondents' age groups (in per cent)							
	Under 20 years	2	2	-	-	4	-	1
	Between 21 and 34 years	27	30	-	-	32	-	11
	Between 35 and 49 years	41	41	-	-	45	-	37
	50 years and over	25	22	-	-	16	-	45
	Did not state	5	5	-	-	3	-	6
	TOTAL	100	100	-	-	100	-	100
(8)	Average spending per party in Sudbury Vacation Area	\$85.45	\$112.43	\$ 70.50	\$ 24.89	\$ 27.50	\$ 50.00	\$132.09
(9)	(8) = Average spending per day per (2) party in Sudbury Vacation Area	\$ 32.87	\$ 44.97	\$ 29.38	\$ 31.11	\$ 25.00	\$ 38.46	\$ 42.61
(10)	(8) = Average spending per stay per (4) person in Sudbury Vacation Area	\$ 24.70	\$ 32.31	\$ 20.74	\$ 8.30	\$ 6.81	\$ 15.38	\$ 39.67
(11)	(10) or (9) = Average spending per day per person in Sudbury Vacation Area	\$ 9.50	\$ 12.92	\$ 8.64	\$ 10.38	\$ 6.19	\$ 11.83	\$ 12.80



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INTRODUCTION

In order to obtain information on visitors to the Sudbury Vacation Area, their travel habits, and their origins, a survey designed by McDonald Research Limited of Toronto, was made from July 1st to August 31st, 1965.

This survey included the use of three samples: a sampling of automobiles having registration from outside the Sudbury vacation area egressing the area; a sample of visitors departing the area by rail and by 'plane; and, finally, a sample of the occupancy of the tourist plant.

From the first two samples, 4,000 names of visitors were selected and questionnaires were mailed to them. Of these, 1,163 were returned, and 1,113 of these were useable.

From the sample of occupancy of the tourist plant, 3,726 tourist occupancy cards were completed and returned.

On the basis of information obtained from these questionnaires, a subsequent analysis was made by Travel Research Branch of the Ontario Department of Tourism and Information, and the following report submitted.

A STUDY OF THE SUDBURY TOURIST REGION

JULY 1 TO SEPTEMBER 1, 1965

Economic Importance of Tourism on the Sudbury Vacation Area

One of the most important elements revealed by the Sudbury Study is that 270,920 passenger cars visited the Sudbury Vacation Area between July 1st and September 1st, 1965.

(Table I - McDonald Report)

The other important element is data on total expenditure of all visitors during this period (Table 50 - McDonald Report). The average total expenditure was calculated on the basis of this total and a figure of \$85.45 per passenger vehicle (per party) was obtained. It is quite clearly stated in the Sudbury Survey that this amount (\$85.45) was spent in the Sudbury Vacation Area only, and of course in addition to this, there would be some expenditure made on the way to and from the area.

If the number of passenger vehicles visiting the area is multiplied by the average spending in the area -

$$(\$85.45 \quad \times \quad 270,920 \quad = \quad \$23,150,114)$$

we arrive at a total of \$23.1 million spent by tourists during two summer months in the Sudbury Vacation Area.

Of course additional tourist expenditure was made during the remaining ten months of the year and it would be supposed this amounted to at least another \$23.1 million, thus arriving at a total expenditure of \$46.3 million per year. This supposition (\$23.1 million in ten months, September to June) is based partly on a study of the occupancy rate of motels and motor hotels which showed that during the months of May, June and September, occupancy of motels in the area was higher than 60 per cent, and during the remaining months, with the exception of December, January and February, it was never lower than 40 per cent.

The Department of Economics and Development estimated that in mid-year 1965, population of the Sudbury Vacation Area was approximately 141,000 persons. Disposable income per head of population in the same year, was approximately \$1,800. Total disposable income was therefore:

$$141,000 \times \$1,800 = \$253,800,000$$

As people from the Sudbury area travel and make purchases outside their own area, it is suggested that 10 per cent of their disposable income was spent outside. Total spending by local residents could therefore have amounted to \$228.4 million and the spending by tourists to \$46.3 million, or 20.3 per cent of that of local residents.

Employment is related to spending and it could be concluded that approximately 20 per cent of employment in the Sudbury tourist area is generated by tourism. This figure is significantly high especially in consideration of the fact that the region is not highly developed compared with Muskoka, and Huronia-Lake Simcoe Regions, indicating that employment generated by tourists could eventually be doubled if all available tourist resources were more intensively utilized.

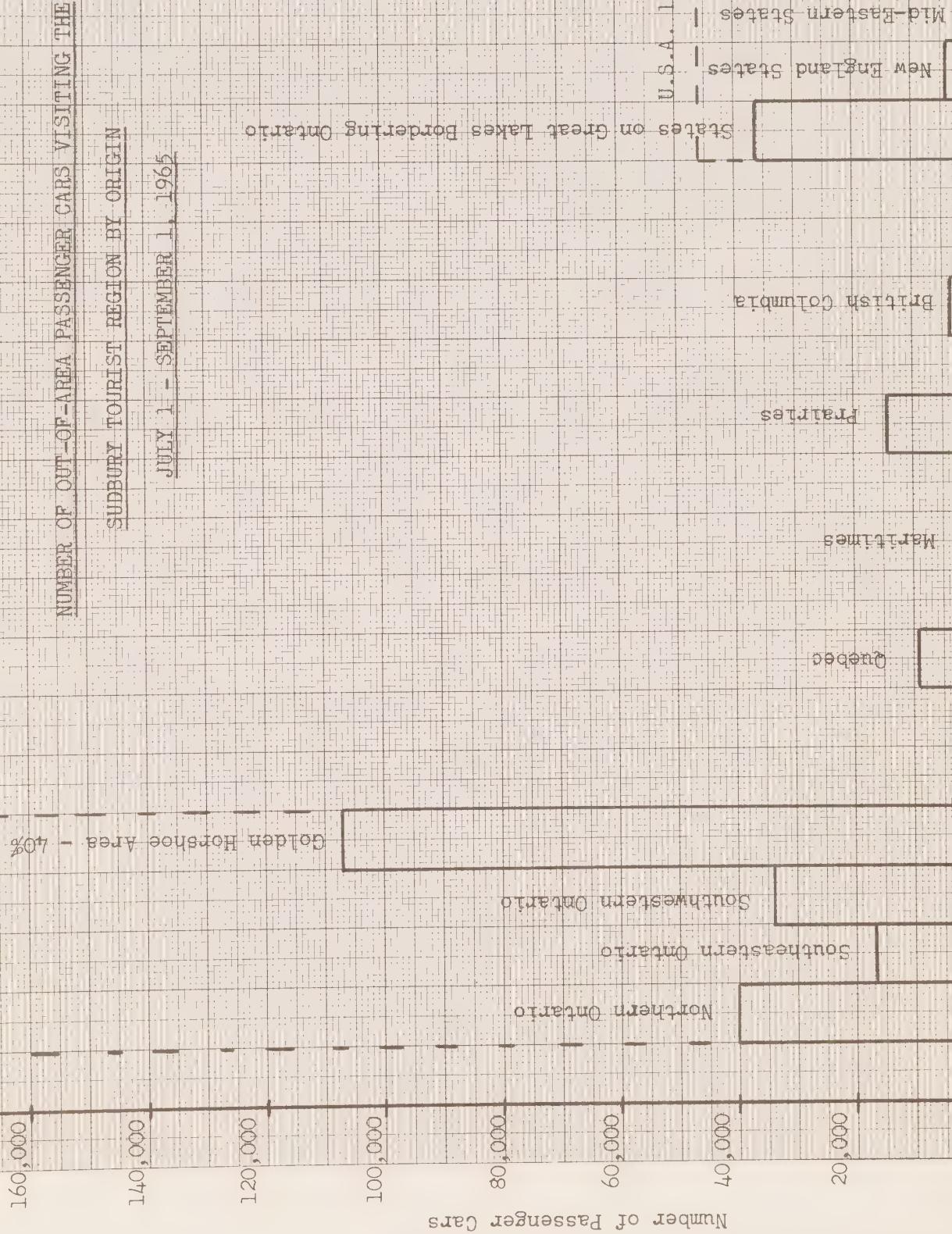
Origin of Out-of-Area Passenger Cars

Out-of-area traffic by origin in the Sudbury Vacation area, is shown on Graph No. 1, as follows:

<u>Origin</u>	<u>Percentage</u>
Golden Horseshoe	40%
Southeastern Ontario	6
Southwestern Ontario	12
Northern Ontario	15
<u>Total Ontario</u>	<u>73%</u>
Quebec	3
Maritimes	1
Prairies	5
British Columbia	1
United States	17
<u>Grand Total</u>	<u>100%</u>

The above percentages indicate the number of passenger cars, but if the average spending by tourists by origin were taken into consideration and multiplied by the number of passenger cars from each origin, the picture is slightly different, as shown by the following table:

<u>PERCENTAGE OF LOCAL SPENDING BY PASSENGER CAR ORIGIN</u>	
<u>Origin</u>	<u>Percentage of Expenditure</u>
Northern Ontario	20.67%
Southern Ontario	50.78
<u>Total Ontario</u>	<u>71.45%</u>
Quebec	2.52
Maritimes	0.15
Prairies	1.54
British Columbia	0.64
United States	23.70
<u>Grand Total</u>	<u>100.0%</u>



Origin of out-of-town Passenger Cars

Thus it can be seen that despite the fact that U. S. passenger cars represent only 17 per cent of the total number of cars, their expenditure is higher than those of other origin.

Approximately 80 per cent of U. S. passenger vehicles originated in those States bordering on Ontario.

PASSENGER CAR EGRESSION

Route	Passenger		Cars
	Ontario Registration	United States Registration	
Highway 17 West	46%		57%
Highway 17 East	26%		14%
Highway 69 South	28%		29%

Apparently many passenger cars visited Sudbury from Sault Ste. Marie and then egressed by the same route. A few continued east on Highway 17, and a considerable number of U. S. passenger cars continued along the shore of Lake Huron, and proceeded on Highway 69 south towards Muskoka, Toronto, and the Niagara Peninsula.

Profile of Travellers in and Visitors to
the Sudbury Vacation Area

Table "A" shows selected statistics regarding visitors to the Sudbury vacation area. Under Item 1, the average length of stay away from home is shown, and this amounted to 13.3 days, for all origins.

The longest time away from home was found among those visitors from British Columbia, who accumulated 28.4 days, and the shortest time away from home was accumulated by Ontario visitors, totalling 10.8 days. There is a very close relation between the distance from Sudbury and the length of time away from home.

Under Item 2, the average length of stay in the Sudbury vacation area is presented. For visitors of all origins, the average length of stay is 2.6 days. This is very short compared with the Muskoka Region, where the average was 4.3 days for the period September 15th to October 15th, 1964. As the average during the summer would certainly be higher, the average of 2.6 days for the Sudbury vacation area referring to the entire summer period (July 1 to September 1) is much lower.

On examination of the average length of stay by origin, we found that parties from the United States stayed longer, an average of 3.1 days. For the remaining origins, the average length of stay was as follows:

Ontario	2.5 days
Quebec	2.4 "
British Columbia	1.3 "
Prairies	1.1 "
Maritimes	0.8 "

TABLE "A" - SELECTED STATISTICS ON VISITORS TO SUDBURY VACATION AREA - JULY 1, SEPTEMBER 1, 1965

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Profile of Travellers and Visitors

An explanation of why U.S. visitors stay longer than others is shown in Table 58 of the McDonald Research Report, which indicates that a large percentage of visitors to summer campsites in the Sudbury area - where the average length of stay is one to two weeks - come from the United States.

In Item 3, the average length of stay in the Sudbury area is expressed as a per cent of the average length of time away from home. Again in this case, the percentage of U.S. visitors is highest; 23.5 per cent of their time away from home being spent in the Sudbury area. The lowest percentage is for Maritimes visitors; 3.1 per cent of their time away from home being spent in the Sudbury area (in general, less than one day).

Very few visitors to the Sudbury area spent their entire time away from home in the area. More detail on this aspect is shown in Table "B".

The average number of persons in each visiting party to the Sudbury area is 3.46. The variation between origins is not significant and the average is slightly higher compared with that of the Muskoka Study, where it was 3.2 persons per trip party.

Items 5, 6, and 7 show education, occupation, and age of the questionnaire respondents. There is very little difference in education, occupation or age of respondents queried, from all origins.

In all, the region did not attract any special type of tourist, but rather reflects a cross-section of summer vacationers as such. The only exceptions are visitors from the United States, whereby the incidence of visitors with completed university education, and the incidence of visitors 50 years of age and over, is slightly higher. Neither education, occupation, nor age, is a factor on the length of visit.

TABLE "B" LENGTH OF STAY IN THE SUDBURY AREA
 AS A PERCENTAGE OF TIME AWAY FROM HOME,
 JULY 1 TO SEPTEMBER 1, 1965

LENGTH OF TIME AWAY FROM HOME	APPROXIMATE PERCENTAGE OF TIME SPENT IN SUDBURY AREA
Less than 1 full day	67%
1 full day	88%
2 - 3 days	63%
4 - 7 days	40%
8 - 14 days	31%
15 - 21 days	16%
22 - 30 days	9%
30 days or more	7%

Profile of Travellers and Visitors

Item 8 shows the average spending per party in the Sudbury vacation area amounted to \$85.45. Again, in this case, the average for visitors of U.S. origin is highest (\$132) and the lowest is for Maritimes visitors (\$24.89).

Item 11 includes the average spending per day per person. The average for all origins was \$9.50. (In the Muskoka Region, for the Fall period only, it was \$8.53) In this case, U. S. visitors spent per person per day, slightly less than visitors from Ontario, and the lowest spending per person per day, was that of visitors from the Prairie provinces, followed by Quebec, the Maritimes, and British Columbia.

The total expenditure per party per stay was, as mentioned before \$85.45, compared with \$117.35 in the Muskoka Region. The Muskoka Region expenditure was greater due to the fact that the duration of stay in the Muskoka Region was 4.3 days, and in the Sudbury Region, only 2.3 days.

It was also observed that in composition of trip parties, there were slightly more teenagers in each party compared with those parties visiting the Muskoka Region. This is due to the fact that the Sudbury Study was conducted throughout the Summer, and the Muskoka Study during the Fall, when schools were in session.

Table "B" shows the relationship between the total length of stay away from home and the average number of days spent in the Sudbury area. Interestingly, those who were away from home one full day, spent 88 per cent of their time away from home, in the Sudbury area. Those who stayed away from home two or three days, spent 63 per cent of their time away from home in the Sudbury area. In this Table, a negative correlation can be observed between total length of time away from home and percentage of time

Profile of Travellers and Visitors

spent in the Sudbury Vacation Area. In other words, the longer the total time away from home, the smaller the percentage of time spent in the Sudbury area. This confirms the comment made earlier, that few visitors spend their entire time away from home in the Sudbury area. We could conclude then, that the Sudbury area had a great many visitors because of its excellent geographic position - practically in the geographic centre of Ontario - but was unable to retain visitors for very long. Compared to other vacation areas, this situation is quite critical. The average length of stay per party in the Sudbury vacation area is shorter throughout the summer than the average length of stay per party in the Muskoka Region during the much shorter Fall period.

Primary reason for visiting the Sudbury Vacation Area partly explains the short length of stay as revealed in Graph No. 2, where the primary reason is given as "visiting while passing through" by 33 per cent of all visitors.

The second most important reason given was "sightseeing" which accounted for 17 per cent, and the third most important reason was "visiting friends and relatives". "Vacationing in the area" category appears in fourth place.

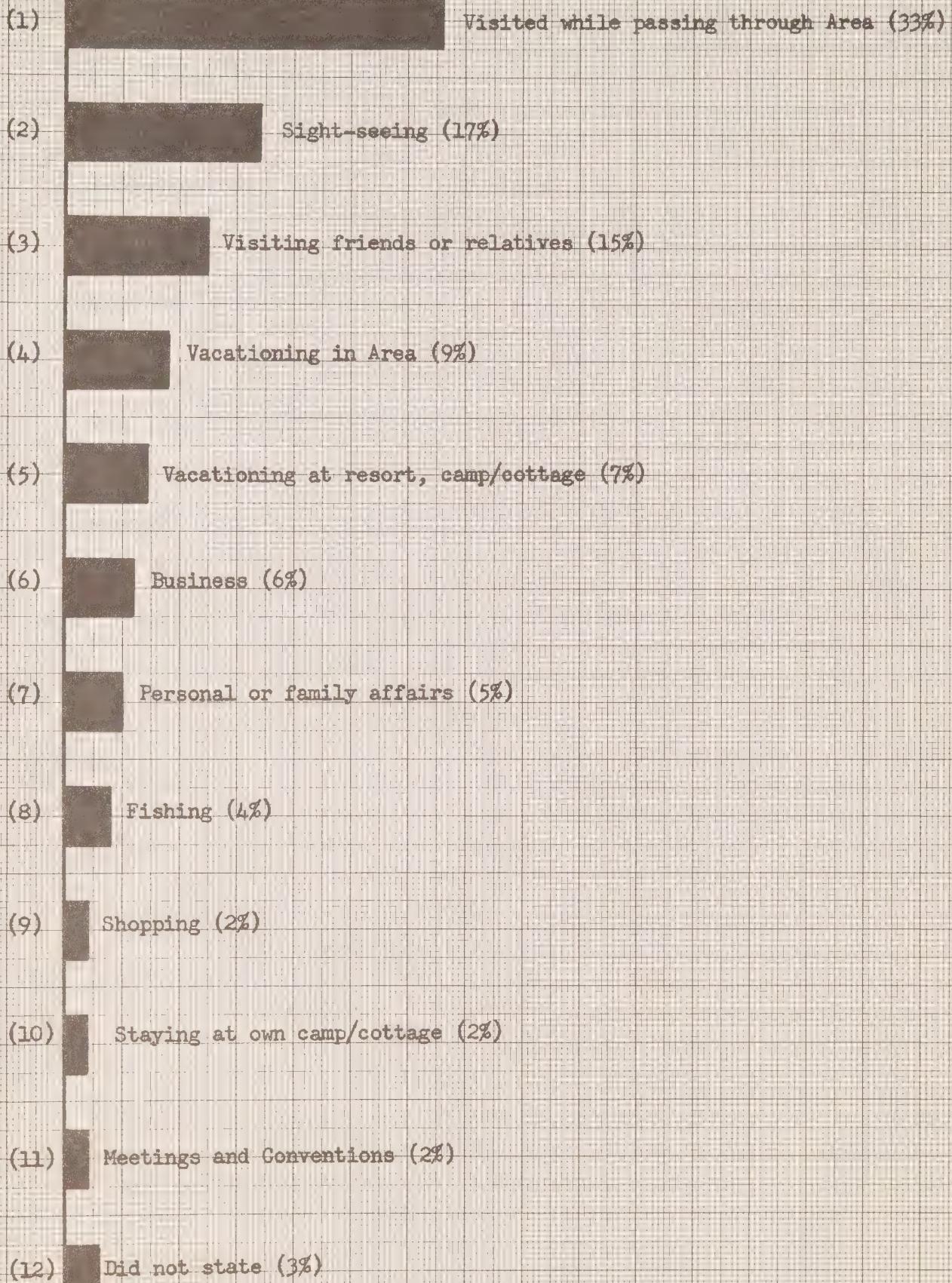
The corresponding percentages for reasons for visiting the Muskoka Region were:

1st -	Vacationing in the area	35%
2nd -	Visiting friends or relatives	17%
3rd -	Business	7%
4th -	Visiting while passing through	4%
5th -	Fishing	3%

There is a marked difference between "just passing through" in the Muskoka Region, compared with the Sudbury area.

PRIMARY REASON FOR VISIT TO SUDBURY VACATION AREAJULY 1 TO SEPTEMBER 1, 1965

GRAPH NO. 2



10 20 30 40
Per cent of all Respondents

Profile of Travellers and Visitors

Obviously, some effort should be made to motivate visitors to extend their stay and not "visit while passing through". It is thought that fishing would be high on the list of primary reasons for visiting the Sudbury area, but as shown on Graph No. 2, it is located in 8th place. This shows that even this natural attraction has not been successful in luring tourists to the area.

Table 35 of the McDonald Research Report shows that 7 per cent of vacationers from Northern Ontario, 4 per cent from Southern Ontario, and 5 per cent from the United States, own a camp, cottage or other dwelling in the Sudbury vacation area. These three categories generated visitors with the longest average length of stay and the highest spending per party. In other words, there is a positive relationship between the ownership of cabin or cottage, and the length of stay. This again confirms the thesis developed by the Muskoka Report, that cottagers are the best trade customers in every area, and the most reliable and consistent visitors. It is in the interest of each vacation area to develop maximum ownership of cottages and cabins to ensure a reliable core of visitors.

Facilities Used by Tourists to Sudbury Vacation Area

Graph No. 3 shows facilities used by visitors to the Sudbury Vacation Area and those most intensively used were:

	<u>Percentage of Visitors</u>
Service Stations	71%
Restaurants	62
Grocery stores	40
Drug Stores	35
Gift and Souvenir Shops	28
Beverage rooms	24
Cigar and variety stores	21
Clothing stores	20
Friend's homes	20

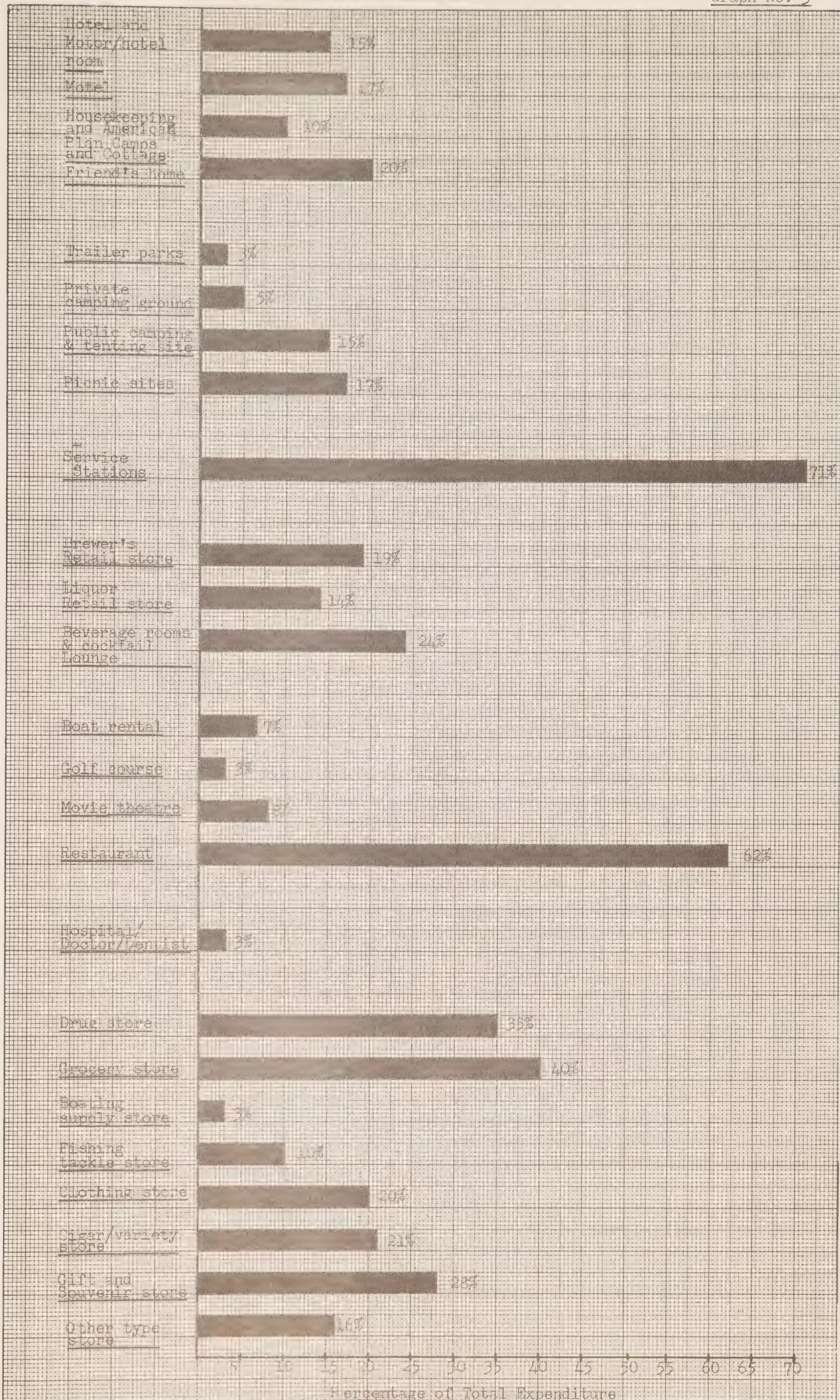
As pointed out previously, the average length of stay in the Sudbury area is short, and the type of facilities most frequently used by tourists varies widely as compared with use of facilities in other vacation areas. Motels, for instance, were used only by 17 per cent of all visitors, as compared with 25 per cent of visitors in the Muskoka Region. However, it is quite obvious that visitors spent a large amount of money in the area despite the rather short average length of stay.

Examination of the usage of facilities compared with the length of stay, revealed that those who stayed one night in the area tended to use hotels and motels more frequently, and those who stayed two weeks or more, stayed most frequently in cabins or cottages.

FACILITIES USED IN SUDBURY VACATION AREA BY ALL VISITORS

JULY 1 - SEPTEMBER 1, 1965

Graph No. 3



Recreation Activities Enjoyed

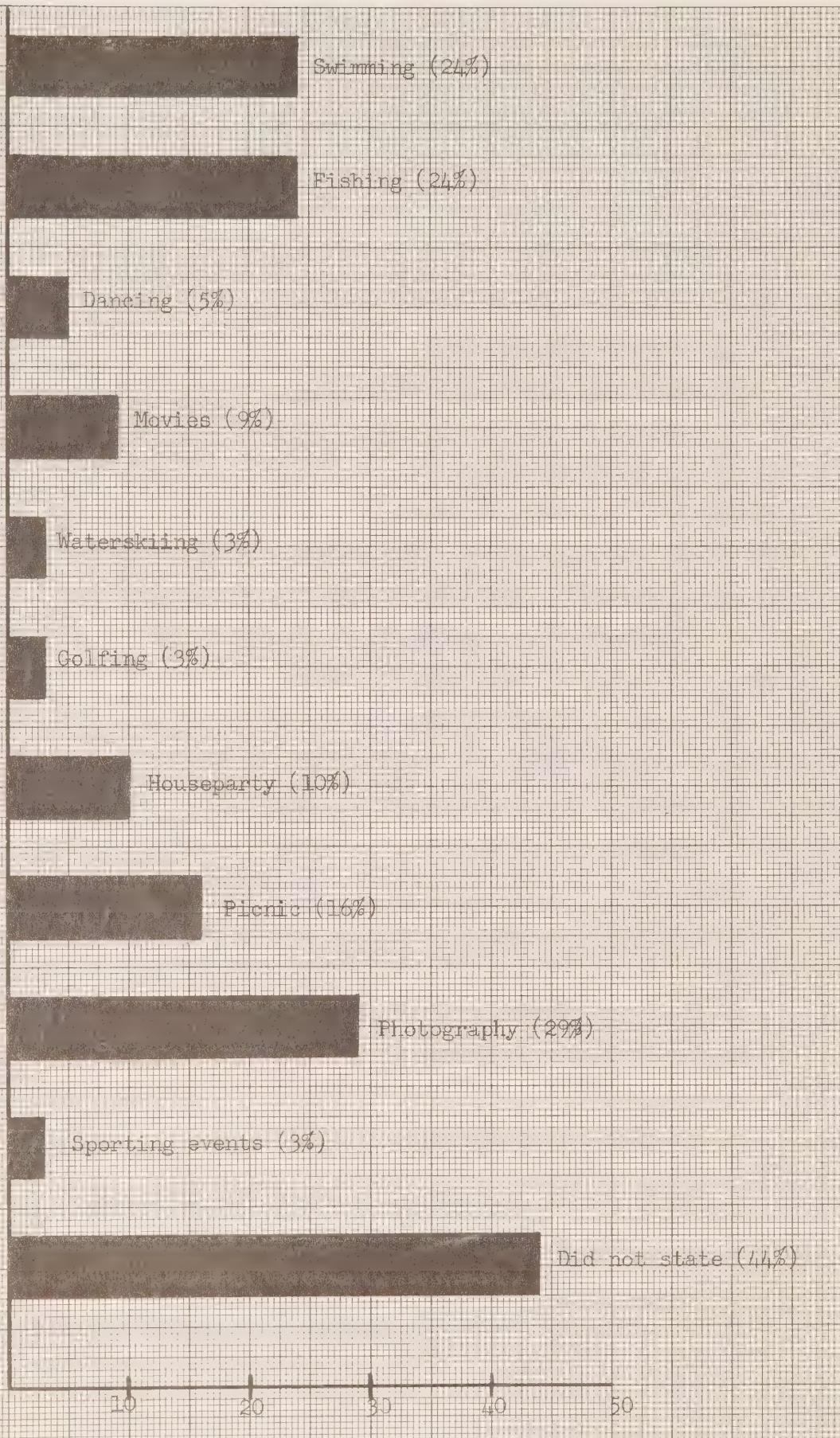
By Visitors to the Sudbury Vacation Area

Graph No. 4 refers to recreation activities enjoyed by visitors to the Sudbury Vacation Area.

Forty-four per cent of visitors did not mention having participated in any recreational activity, and again, this could be because of the short length of stay prevalent in the area.

For those who did engage in recreational activity, photography, swimming and fishing were mentioned most often, and surprisingly, only three per cent of visitors were attracted to golfing, and water skiing.

Comparing recreational activity by tourist origin, it was discovered that Americans used the area more for photography and fishing than any other group. Visitors from other parts of Ontario engaged more frequently in a social type of activity, such as dancing, picnics, house parties, and movies.

RECREATIONAL ACTIVITIES ENGAGED IN BY VISITORSTO THE SUDBURY VACATION AREAJULY 1 - SEPTEMBER 1, 1965Graph No. 4

Respondent's Ratings
of Tourist Facilities

One of the most important sections of the Sudbury Study is that section dealing with ratings of area facilities.

Graph No. 5 shows that hotel and motel accommodations are rated very highly, as 80 per cent of visitors who used those facilities rated them positively. Service Stations were rated positively by 76 per cent of visitors; restaurant food by 66 per cent; lodge, cottage and cabin accommodation by 65 per cent, restaurant services by 64 per cent, and beverage and lounge rooms by 61 per cent of visitors.

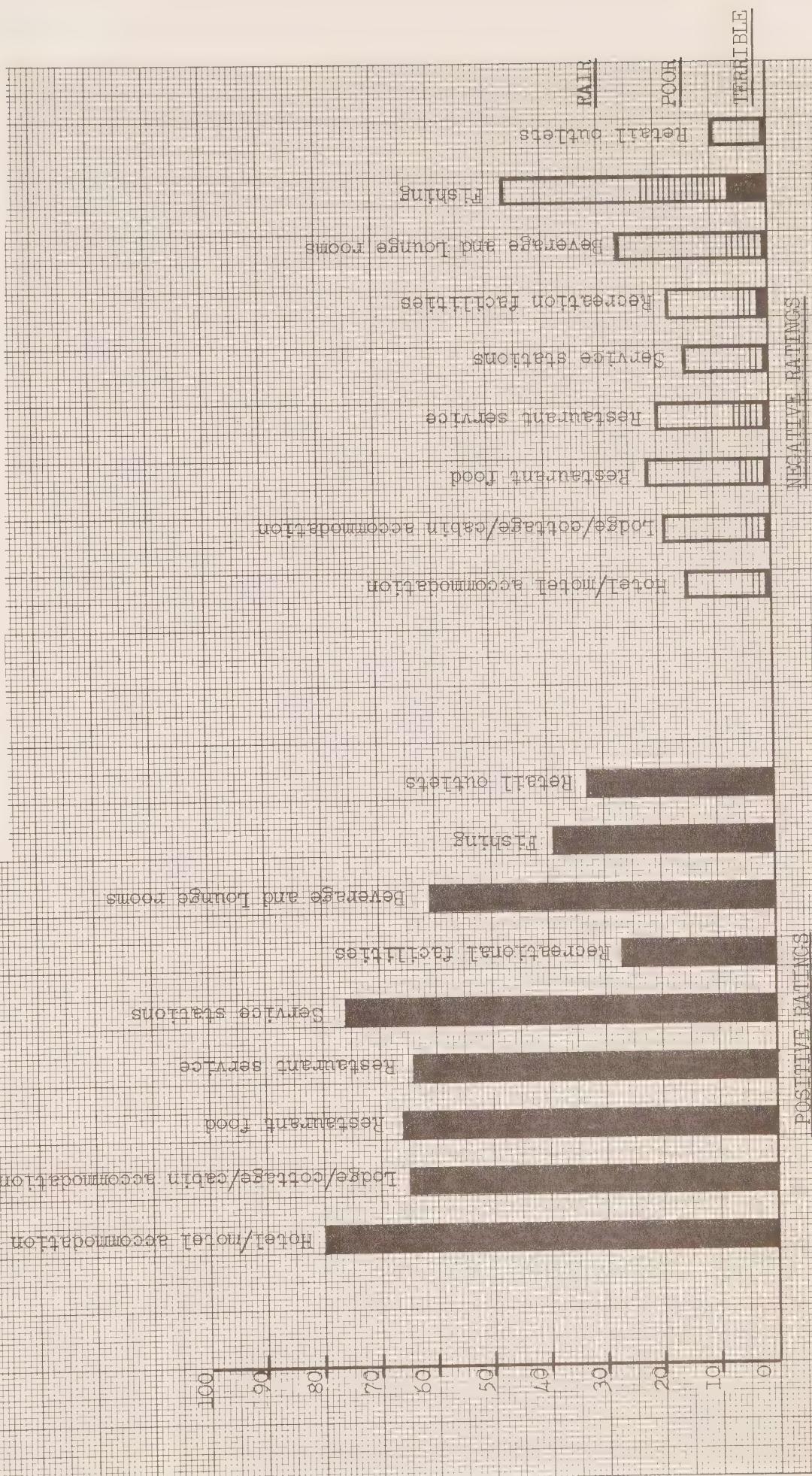
Some facilities were rated very low, for example:

Recreation	27%
Fishing	39%
Retail outlets	33%

There is no doubt that recreational facilities and retail outlets should be improved in some manner.

RATING OF FACILITIES AND SERVICES IN SUDBURY VACATION AREA

BY VISITORS WHO USED THEM - JULY 1 - SEPTEMBER 1, 1965



Tourist Attractions Visited

From the McDonald Research Survey in the Sudbury Vacation Area, it was found that attractions visited by visitor-respondents were as follows:

<u>Attraction</u>	<u>Per cent of Visitors</u>
Big Nickel	50
Slag pouring	16
Historic sites	15
Inco smelter at Copper Cliff	11
Model mine	10
Campus tour, Laurentian University	9
Surface plants at Falconbridge	4
Vermillion Sanctuary	1
Did not State	40

and from the above, the "Big Nickel" proved to be by far the best tourist attraction in the area, with "slag pouring" second, and "historic sites" third. It is interesting that the Canadian Government Travel Bureau, in their publication "Travel Survey for the Year 1965" stated that historic sites were in third place (in attractions visited by American tourists) showing that historical sites are very definitely important to tourism and should be duly promoted in the province.

It is surprising that 40 per cent of visitors did not mention visiting any attraction. This could reflect the short length of stay of a large proportion of tourists who would not have time for sightseeing. As could be expected, tourists who stayed longer, visited more attractions. On the other hand, there is no lack of sightseeing attractions in the area, but advantage was not taken of the opportunities at hand, by the resort type of vacationer who did spend a longer time there.

Specific Expenditures by all Visitors

On the average, visitors to the Sudbury Vacation Area spent the following amounts on:

Food and beverage	\$40.85
Souvenirs	12.58
Supplies	7.12
Entertainment	25.80
Other purchases	20.66
Accommodation	\$37.80

These averages are not very representative, because, when added together, they total more than the average based on Table 50 of the McDonald Research Report, which amounted to \$85.45. The discrepancy lies in the fact that in many cases, it was not specified how much money was spent on specific items by all respondents; for example 20 per cent of those stating they bought food or beverages, did not state how much they spent on these items. Sixty-seven per cent of those purchasing souvenirs, did not state how much was spent on souvenirs; 83 per cent of those buying supplies, 78 per cent of those making expenditures on entertainment, 38 per cent of those making other types of purchases, and 59 per cent of those who made expenditures on accommodation did not specify the amount in each case.

Utilization of Accommodation by Visitors
to the Sudbury Vacation Area

The above subject was covered in Part IV of the McDonald Research Report for the period July 1 to September 1, 1965. As the Travel Research Branch carried out an intensive study on motel accommodation for the entire year (November 1964 to October 1965) details of which are given in the Motel Occupancy Report, 1964-65, and a similar study covering all tourist establishments in Ontario is now under way, a thorough analysis of the facts revealed by the very small sample carried out by McDonald Research will not be made in this Report.

However, highlights of the daily occupancy rates by type of accommodation are shown on Graph No. 6. These are for hotel and motel, cottages offering American Plan, and cottages offering Housekeeping plan accommodation. From the graph it can be seen that cottages with housekeeping plan had the highest occupancy rate for most of the period examined. The second highest was for motels and motor/hotels, and the third highest was for cottages offering American Plan accommodation. The graph also shows that for these three types of establishment, occupancy during the month of August was slightly lower compared with the month of July.

The other important fact revealed by the survey, was that occupancy of motels and hotels during weekends, was lower than during week days. These results are identical to those shown by the study of motel occupancy recently completed by Travel Research Branch.

Motels and Motor Hotels

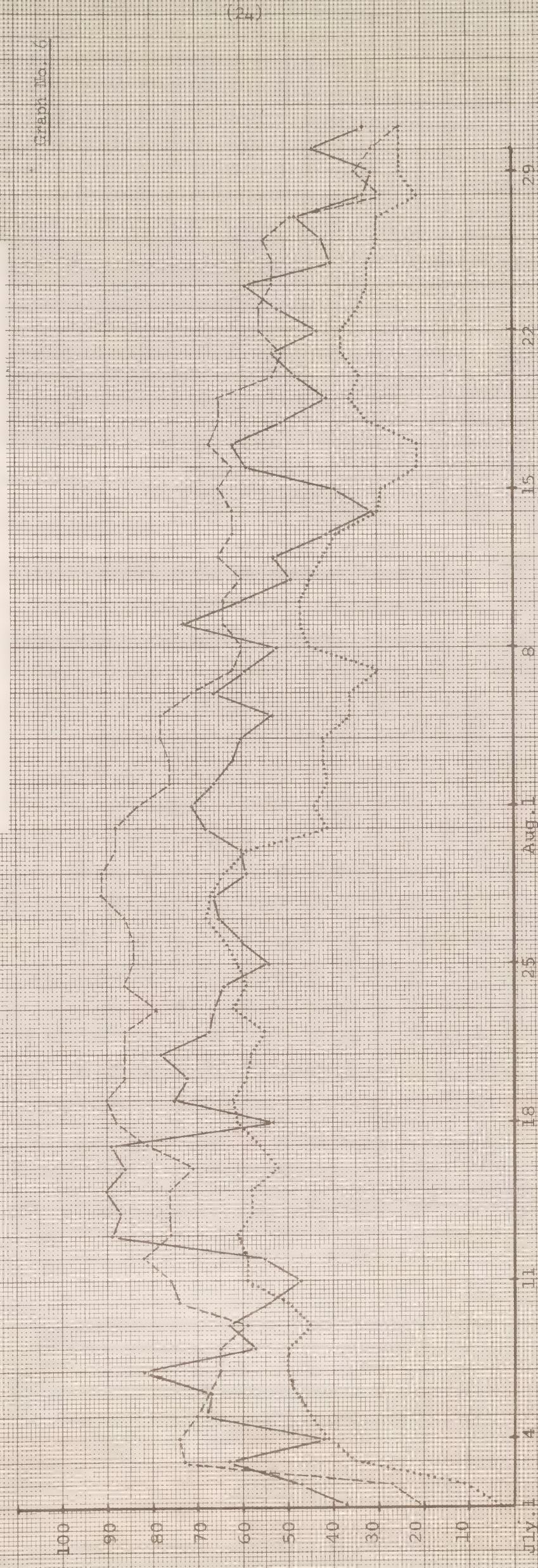
Cottages Offering American Plan

Cottages with Housekeeping Plan

DAILY OCCUPANCY RATES IN THE SUDBURY VACATION AREA

BY TYPE OF ACCOMMODATION

JULY 1 TO SEPTEMBER 1, 1965



Utilization of Accommodation

Cottages offering American Plan accommodation and cottages with Housekeeping Plan, showed a slightly lower accommodation rate during weekends, compared with the rest of the week. For instance, cottages with Housekeeping Plan had an occupancy rate during week days for the month of July, of 76.3 per cent, and during weekends, of 74.7 per cent. The figures were 61.0 per cent during week days, and 56.7 per cent during weekends for the month of August.

As mentioned previously, the United States generated 17 per cent of all tourists visiting in the Sudbury Vacation Area during the months of July and August, 1965, but their usage of "for-hire" accommodation was very high, as:

- 39% - of patrons of hotels and motor/hotels were from the United States
- 71% - of patrons of cottages offering American Plan accommodation were from the United States
- 58% - of patrons of cottages offering House-keeping Plan were from the United States

showing quite clearly that U. S. tourist contribution to tourist activity and spending in the area is high in proportion to their numbers. Promotion should be focussed on this type of tourists in order to increase their number.

Recently, an analysis of visitors to our Ontario Government Reception Centres was made by the Travel Research Branch. Visitors to our reception centres were asked to fill out a registration card (sample copy included in the Appendix) which shows, among other things, the origin and destination of guests.

Data from these cards was transferred to IBM punch cards and all those visitors giving Sudbury as their final destination were

Utilization of Accommodation

selected and further tabulation made so that we arrived at statistics showing the origin of U. S. visitors to the Sudbury Vacation Area, as follows:

Michigan	24.7%
Ohio	21.2
New York	12.9
Pennsylvania	5.9
Illinois	4.7
Massachusetts	3.5
Wisconsin	2.4
New Jersey	2.4
Indiana	2.3
Other U. S. States	<u>20.0</u>
	100.0%

The above information shows in what areas advertising organized locally by Sudbury businessmen and associations should be focussed. It shows where the best American customers for the Sudbury area are located, and also where additional promotion is advisable.

In addition to origin, the survey also showed the general interests and special interests of visitors to the Sudbury area. General interest, in order of magnitude, was as follows:

1. Sightseeing	42.9%
2. Fishing and Hunting	34.5%
3. Water Sports	14.3%
4. Visiting friends and relatives	4.8%
5. Other	<u>3.5%</u>
	100.0%

Special interests of visitors, in percentage of incidence were as follows:

Utilization of Accommodation

1. Visiting attractions	53.6%
2. Boating	15.5%
3. Historical sites	4.8%
4. Golfing	3.6%
5. Sightseeing cruises	1.2%
6. Other	2.4%
7. Did not state	<u>18.9%</u>
	100.0%

This study of activities of general interest and special interest to tourists again shows that sightseeing, fishing and hunting, water sports, boating, and visiting specific attractions are the main points of interest and every effort should be made to assist in their development, and to have them extensively advertised.

Tourist Expenditure in the Sudbury

Vacation Area

(July 1 to September 1, 1965)

In the original report prepared by McDonald Research Limited, there was no information given on the average length of stay and total expenditure by type of accommodation in the Sudbury Vacation Area. As this type of information is essential, additional tabulation was requested, and on the basis of data obtained, calculations similar to those on page 15 of the Muskoka Study were made.

First, the average total tourist expenditure made by respondents using the different types of accommodation was calculated, the average length of stay extracted, and both are shown in Table "C". Guest-days for each type of accommodation and length of stay were calculated, and these data are shown in Table "D".

Multiplying each number from Table "D" by the corresponding tourist expenditure per day, the total tourist expenditure in the Sudbury Vacation Area, by type of accommodation and length of stay, was obtained. Results are shown in Table "E" and Graph No.7. This information is extremely relevant as it reveals the importance of the various types of accommodation, and in each type of accommodation, the length of stay which is economically the most productive.

According to data obtained for the Sudbury Vacation Area, 32.3 per cent of the total tourist expenditure was made on trailer camps, private and public camping grounds, and picnic sites.

Tourist Expenditure

Interestingly, for the Muskoka Region, this figure amounted to 7.03 per cent, but this is probably due to the fact that the Muskoka Study was conducted from September 15 to October 15, rather than during the summer months, when the use of campsites is more feasible.

Another interesting feature is that the total tourist expenditure made by tourists using friends' or relatives' homes as their accommodation amounted to 20 per cent of the total tourist expenditure. This expenditure refers mainly to purchase of food, beverages, and other services. In the Muskoka study this figure amounted to 16.72 per cent. It is relevant that the Study of Metropolitan Toronto Households, conducted in 1964-1965, showed that tourists originating in Metropolitan Toronto, who used relatives' or friends' homes as accommodation, spent 26.12 per cent of the total tourist expenditure in Northeastern Ontario.

The Metropolitan Toronto Study also revealed that the weighted average expenditure for all Ontario of the total tourist spending by visitors using friends' or relatives' homes as accommodation, amounted to 27.76 per cent. We can conclude, therefore that the category of friends' or relatives' homes, is quite an important type of accommodation, and is used by great numbers of tourists.

Another important aspect shown in Graph No. 7, is the fact that housekeeping camps and cottages, and American Plan tourist facilities, added together, represent only 17.45 per cent of the total tourist expenditure. The Muskoka Study showed that tourists using cottages as accommodation (only cottages, not campsites), spent 36 per cent of the total tourist expenditure in that area. The low figure for cottagers in the Sudbury area is due to the fact that there are few cottage facilities available. In 1963 there were 1,508 cottages served by the Ontario Hydro in the Sudbury area, and 8,196 in the Muskoka

Tourist Expenditure

area. Of course, there are some cottages not served by Hydro in each area. Taking into consideration the multiplicity of lakes in the Sudbury region, as well as the extensive shoreline of Georgian Bay, there is no reason why more cottages could not be situated in the area.

In the meantime, effort should be concentrated on the improvement of hotels and motels, as well as campsites, as these facilities generate two-thirds of the total tourist expenditure in the region. There are many advantages to increasing the number of cottages, cabins and campsites, as these are the main generators of tourist dollars in the following six vacation areas of the province:

<u>Vacation Area</u>	<u>Per cent of Total Annual Tourist Expenditure</u>
Huronia - Lake Simcoe	47.7%
Kawarthas) Great Pine Ridge)	50.0% (approx.)
Haliburton Highlands	74.8%
Muskoka) Grey-Bruce)	58.63%

TABLE "C" - LENGTH OF STAY IN THE SUDBURY AREA, EXPRESSED IN GUEST-DAYS

BY TYPE OF ACCOMMODATION AND LENGTH OF STAY, JULY 1 TO SEPTEMBER 1, 1965

(31)

LENGTH OF STAY	TYPE OF ACCOMMODATION				TOTAL
	Hotel/ motel	Housekeeping camp/cottage	American Plan Tourist camp/cottage	Friend's home	
Less than 3 hours	1.5	0.6	-	2.4	5.5
3 hours to 1 day	9.9	4.4	-	9.9	30.6
1 night	134.0	14.0	2.0	31.0	69.0
2 - 4 nights	258.0	42.0	15.0	192.0	288.0
5 - 10 nights	105.0	150.0	37.5	127.5	375.0
10 nights or more	169.0	182.0	26.0	391.0	519.0
TOTAL	677.4	393.0	80.5	753.8	1,287.1
					3,191.8

TABLE "D" - AVERAGE TOURIST EXPENDITURE PER PARTY PER DAY, AND AVERAGE LENGTH OF STAY IN DAYS

IN THE SUDBURY AREA, BY TYPE OF ACCOMMODATION, JULY 1 TO SEPTEMBER 1, 1965

(32)

	Hotel/ motel	Housekeeping camp/cottage	American Plan Tourist camp/ cottage	Friend's home	Trailer, camp/ Picnic site
(1) Average Total Tourist Expenditure (Per Party)	\$121.67	\$198.31	\$334.17	\$125.59	\$103.04
(2) Average Length of Stay in Days	2.46	5.31	5.75	4.26	3.70
(1) — (2)					
(3) Average Tourist Expenditure per Day (Per Party)	\$49.46	\$37.35	\$58.12	\$29.48	\$27.85

TABLE "E" - TOTAL TOURIST EXPENDITURE IN SUDBURY AREA BY TYPE OF ACCOMMODATION AND LENGTH OF STAY

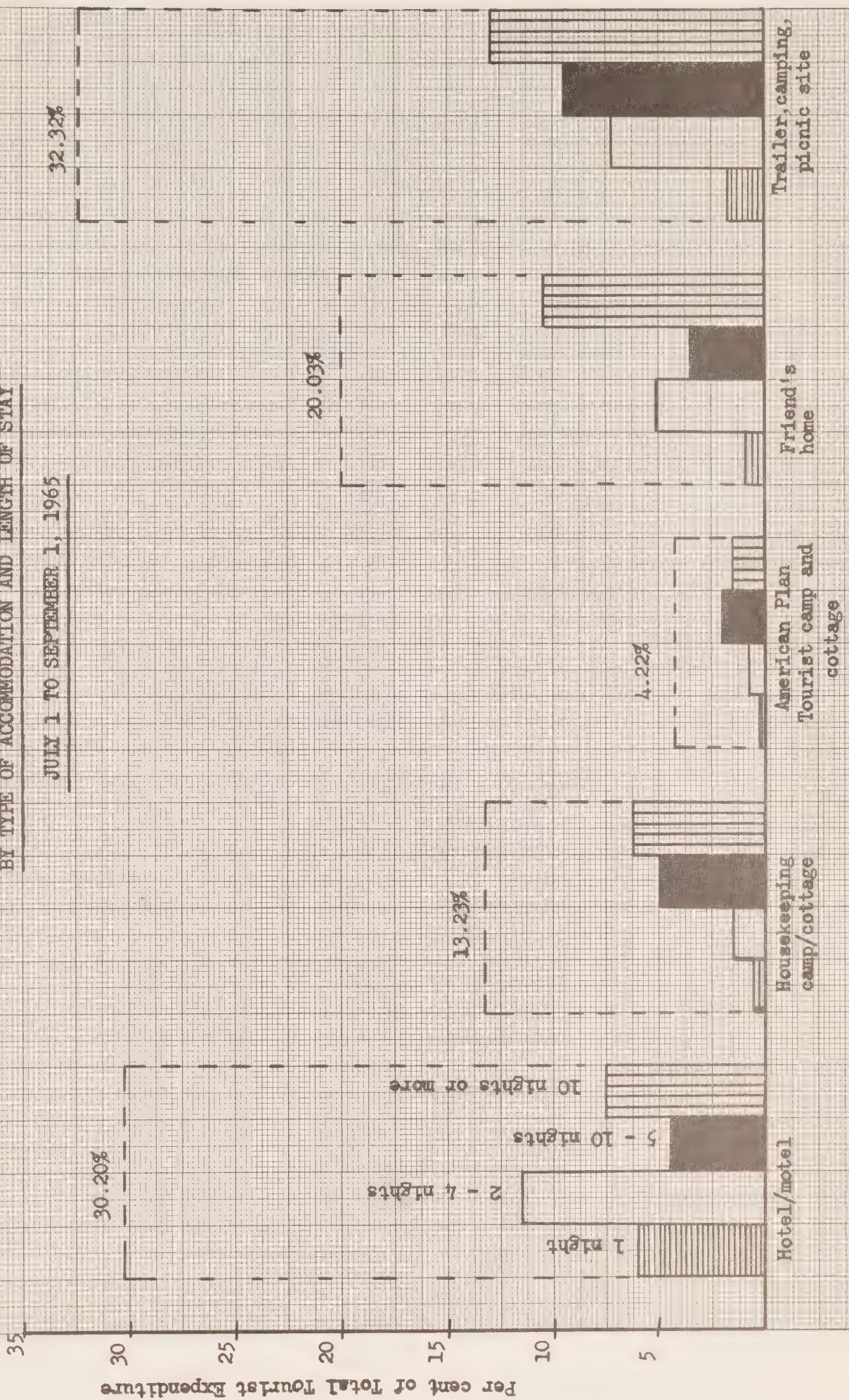
(33)

Length of Stay	Hotel/ Motel	Type of Accommodation			Total \$	Total %	Cumulative Percentage
		Housekeeping Camp/Cottage	American Plan/ Tourist Cottage	Friend's Home			
Less than 3 hours	\$ 74.19 % 0.07	22.41 0.02	-	70.75 0.06	153.18 0.14	320.53	0.29 100%
3 hours to 1 day	\$ 489.65 % 0.44	164.34 0.15	-	291.85 0.26	852.21 0.77	1,798.05	1.62 99.71
1 night	\$ 6,627.64 % 5.97	522.90 0.47	116.24 0.11	913.88 0.82	1,921.65 1.73	10,102.31	9.10 98.09
2 - 4 nights	\$ 12,760.68 % 11.50	1,568.70 1.41	871.80 0.79	5,660.16 5.11	8,020.80 7.23	28,882.14	26.04 88.99
5 - 10 nights	\$ 5,193.30 % 4.68	5,602.50 5.05	2,179.50 1.96	3,758.70 3.39	10,443.75 9.42	27,177.75	24.50 62.95
10 nights or more	\$ 8,358.74 % 7.54	6,797.70 6.13	1,511.12 1.36	11,526.68 10.39	14,454.15 13.03	42,648.39	38.45 38.45
TOTAL	\$ 33,504.20 % 30.20	14,678.55 - 13.23	4,678.66 4.22	22,222.02 20.03	35,845.74 32.32	110,929.17 100.00	100.0%

TOTAL TOURIST EXPENDITURE IN THE SUDBURY AREA

BY TYPE OF ACCOMMODATION AND LENGTH OF STAY

JULY 1 TO SEPTEMBER 1, 1965



3 1761 11546867 0

